

Context

Introduction

In trying to describe the process and outcomes I wish to achieve in my quest to build a learning organisation, I believe it is essential to attempt to describe the context in which my organisation exists and the context in which I work. For me, the context can, at times, seem like a complex and heady maelstrom of political, emotional, financial and psycho-social aspects, constantly rolling and changing through time and space. Describing this complexity in a two dimensional way does not do it justice.

In an attempt to 'analyse' this maelstrom, I have looked for a framework which will allow me to set out my thoughts, beliefs and feelings in a logical way, not that the complexity always lends itself to logic! There is various ways in which I could frame this discussion but, as this is part of my self study, I seek to find a way of framing which is meaningful to me.

The place of knowledge, knowing and meaning I address later. However, in attempting to describe the context in which I work I fall back on my experience, which is unique, and the way I see the world, which is also unique. Throughout my many and varied work experiences I have had a passion for many things. I am a chemist and biologist, a teacher, an analyst, a psychologist and a manager. These aspects of my work, leaving aside for the moment any non-work experiences, provide me with that unique way of

'seeing' the world and making meaning of what I experience. They form part of my 'embodied knowledge'.

In my attempt to make sense of the context I am also aware that you, the audience for this writing, also need to make sense of it and, importantly, come to some understanding of how I see the world. To do this, I turn to Morgan (1986) who uses metaphors to describe and analyse organisations. The importance of metaphor, as Morgan points out, is not just a way of describing things but it exposes a way of thinking or seeing.

"Metaphor is often just regarded as a device for embellishing discourse, but its significance is much greater than this. For the use of metaphor implies *a way of thinking* and *a way of seeing* that pervade how we understand our world generally" (Morgan pp 12)

I would add to that notion, that my metaphor of a 'maelstrom' is in many ways what it *feels like*, as someone inside the organisation, and describes *my way of experiencing*.

I have no doubt that analysis of any organisation through metaphor can be helpful. However, such analysis is based on observation of the organisation from the outside. For instance, Morgan suggests that organisations can be seen in terms of metaphors of machines, organisms, brains, psychic prisons or political systems. Each metaphor has something to offer in terms of understanding organisations but each has its limitations, not least in my view, the inability to capture the full complexity of an organisation, its relationships with the external and internal environment, in time and space. This is not criticism of Morgan's work but merely recognition of how difficult it is to

successfully describe organisations and their contexts in a way that can provide a definitive understanding of how they work, if that indeed is even possible.

Some people may find the metaphor of a machine helpful in framing experiences of an organisation; others may find the notion of psychic prisons useful. Indeed, some organisations may be more akin to machines than others e.g. the Armed Forces. For me, the organisation I work in, being part of a Local Authority Children's Service and the fact that I find the metaphor of an organism a more meaningful and dynamic way of presenting my thoughts, probably due to my past experiences, as good as any a place to start.

To fully understand an organism, such as a human being, one needs to study it over time; from conception to birth; growing up; learning; making mistakes; maturing and aging. One must look at its genetic past, its relationship with its environment and relationships with others. One would also need to look at other organisms to determine if this particular organism was unique or a typical example of the genus or species. Again, this analysis is very much from an outside observer viewpoint; where there is an attempt to describe the environmental factors, what the organism is doing, what others are doing in relation to the organism and to describe those actions and generate theory.

The living theory approach to action research (Whitehead and McNiff 2006) that I am adopting is different, in that...

“...the focus swings away from the spectator researcher and onto the practitioner researchers. Practitioners investigate their own practice, observe, describe and explain what they are doing and why they are doing it. Practitioner researchers already know what they are doing in their everyday lives in the sense that knowledge is embodied in what they do. Each person already has their own tacit theory within themselves about how they should live, and they work collaboratively to make sense of what they are doing by talking through their ideas, and monitoring the process” (Whitehead and McNiff pp13)

This approach makes it possible, at least, to attempt to understand an organisation from the inside; as a part of the organism, influencing the functioning of the organism, in part determining whether the organism can survive, grow and flourish or whether it will, or even should, wither and die.

In taking this approach it is necessary to take both views i.e. an outsider perspective, which can describe as best it can, the environment from an objective viewpoint and an insider viewpoint which takes into account what I experience, as part of the organism.

Over the course of this research things will change. It is inevitable that the environment in which this organism lives will change, possibly becoming more hostile and more challenging. It is inevitable, and desirable, that I will change over time, as my understanding of my influence on the organism grows and my behaviour, and that of the organisation, changes. The combination of these changes, and those I have yet to know about, again makes written description difficult. Unavoidably, the context described below is one which is frozen in time and space and reflects my conception and understanding of the

organism (organisation) and my place within it at this point in time (April 2010).

The outsider view of the organisation as an organism – April 2010

Although there are various metaphors that could be employed to analyse the organisation, I use the 'organisation as an organism' metaphor as the main way of looking at it from the outside. Morgan identifies the strengths of using this metaphor as...

"...the emphasis placed on understanding relationships between organisations and their environments...survival as the key aim or primary task facing any organisation...that in identifying different "species" of organisation we always have a range of options ... [that is] managers and those involved in organisational design always have choice... [and] that it stresses the virtue of organic forms of organisation in the process of innovation... Finally, the metaphor is making important contributions through a focus on ecology and the inter-organisational relations" (Morgan pp 73)

To extend this metaphor, organisations can, and do, exist within other organisations and alongside others to varying degrees and effect. Some relationships could be described as symbiotic, others parasitic.

"...most organisations are not as functionally unified as organisms. The different elements of an organisation are usually capable of living separate lives, and often do so. While organisations may at times be highly unified, with people in different departments working in a selfless way for the organisation as a whole, they may at other times be characterised by schism and major conflict" (Morgan pp75)

The organisation I lead and manage (Education Inclusion) is a relatively small part of a bigger organisation (Children's Services), which is part of a bigger

organisation (the Local Authority), which is part of a bigger organisation (Local Government) and so on. This, in my view, suggests a limitation to the metaphor as a way of understanding. My organisation is clearly open to influence from the bigger organisations and their visions, hopes, values and fears. The notion of organisations adapting to their environments is not so straightforward when the bigger organisations are capable of determining their fate; the basic metaphor does not fully recognise the function of power and politics in the wider system or organisation, as the following should demonstrate.

The wider organisation in which I work is a Local Authority (Local Government), part of which is my smaller organisation. In this context it has a Political aspect that shapes the services and approaches to the wider local environment. Having been controlled for sometime by the Liberal Democrats until 2008, it is now controlled by the Conservatives. National Government is currently overwhelmingly Labour and there is a General Election due imminently, probably in May 2010, which is likely to bring a change of Government or the possibility of a minority Government. [*Update: the General Election has been called and will be held on 6th May 2010*]

Economically, the national picture is bleak in that, in 2008 we entered into an economic crisis the extent to which has not been seen since the Second World War. This is beginning to have a significant impact on the organisation and those working in the organisation as well as those outside being serviced

by the organisation, service users or customers, and will do so for some time to come. Within my Local Authority £30 million of savings need to be found over the next three years (2010-2013). This already has had a direct impact on my services with a requirement that my part of the organisation save, in the financial year 2010-11, £210,000 from a budget of approximately £1.5 million, equating to a 14% cut. This is from a service that, I would say, was already 'lean'. The result has been that redundancies have had to be made; people in the organisation have been identified and fears and anxieties have been raised throughout my part of the organisation. The economic situation and all the uncertainties that it brings is likely to go on for some time, some pundits estimate that it will be twenty years before the country is back to the same economic position as it was before the economic crisis. Even if there are no new cuts, it looks like there will be little growth for some considerable time.

The services that I deliver generally relate to some of the most vulnerable children and young people in the Authority i.e. services to children with Special Educational Needs and/or disabilities. The Portage Service (a home visiting service to support parents of children with significant learning needs) has been cut completely and this has caused a minor outcry from Politicians and users, as can be seen from the article in Appendix 1. This demonstrates the complexity of the situation when there are Political and power influences from the bigger organisations and, in terms of the metaphor, the environment is changing rapidly and potentially becoming increasingly hostile. This raises

the issue of whether my organisation can adapt quickly enough to the changes; whether it can flourish, or whether it will wither.

This is only part of the environmental context. At the same time as financial savings are required, more is being asked of my organisation. Financial savings are also taking place in other parts of the organization and this has brought increased pressures into my part of the organisation, as work is 'shifted' from one place to another. In addition, National Government, through the National Strategies, has embarked on a series of initiatives to improve the lives of vulnerable children and young people. Whilst this is a laudable aim, there are no additional resources associated with these initiatives at a time when locally resources are being reduced for an already lean service. Furthermore, the Government is changing legislation following various reviews, all in 2009, such as the Lamb Review (www.dcsf.gov.uk/lambinquiry/), Steer (www.teachernet.gov.uk/wholeschool/.../steer/fourreports/), Badman (www.dcsf.gov.uk/.../ete/independentreviewofhomeeducation/) and Rose Report (www.dcsf.gov.uk/jimroseanddyslexia/), all directly affecting Education Inclusion. Legislation has already been passed (www.nweo.org.uk/Workforce/Apprenticeships/Apprenticeships+Act) to the effect that the responsibilities of the Learning and Skills Council will transfer to Local Authorities from 1st April 2010. This has a direct effect on Education Inclusion, as the responsibility for learners with learning difficulties and disabilities from 16-19 now rests with the Local Authority and is within my

part of the organisation. Again, this demonstrates that the external environment is changing; changing quickly and quite dramatically for my organisation.

The wider Local Authority and Children's Services organisations are also looking at ways of 'transforming' themselves and the services the Council offer.

http://www.bathnes.gov.uk/committee_papers/OandSCPR/CPR100111/09zAp px8TransformationSAP.pdf

This includes, rationalizing physical space and changing the working environment; joining up services with the Primary Care Trust and creating a Children's Trust as required by legislation.

Returning to the organism metaphor, Maslow's hierarchy of needs (1968) (Figure 1.) suggests that there are various levels of need that have to be satisfied before an organism (individual or organisation) can function fully at a high level. The basic level of functioning is one of physiological need; the need for wages and safe and pleasant working conditions. The second level is one of security; the need for job security, pensions, career paths etc within the organisation. The third is the social level where the organisation of work allows interaction with other and offers social opportunities. The fourth level is one of ego or self esteem; one where the job offers a chance of achievement and improvement; offering the possibility for promotion. Finally there is the

level of self actualisation; one where the employee is fully committed and what they do becomes a major part of their expression of life.

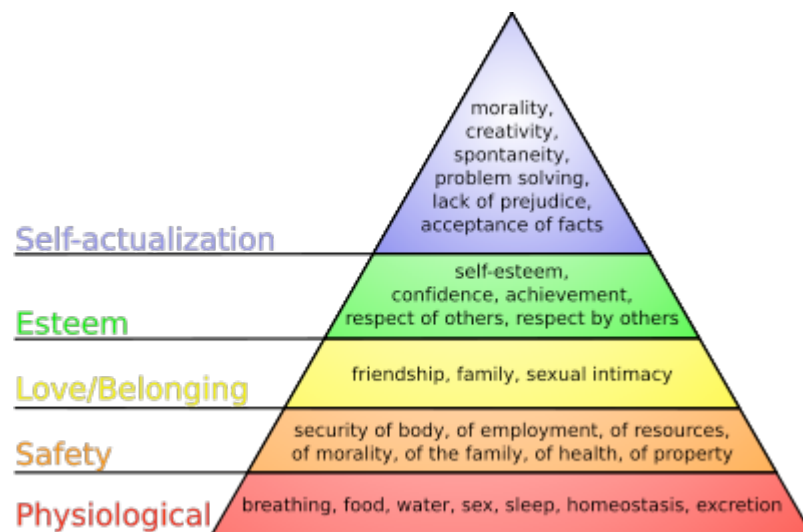


Figure 1 - Maslow's Hierarchy (relating to an individual)

Given this hierarchy, and the current context as described, where, at the physiological level, livelihoods and job security are under threat and the prospects for social interaction, promotion and advancement are diminishing and job satisfaction is likely to decrease, because of increased pressures, it would not be surprising to find an organism (individual or organisation) ailing from the pressures within its environment and finding it difficult to adapt sufficiently, within the short time scale necessary.

As I mentioned previously, I am describing this at a moment frozen in time and space. This real situation is however, more complex as the interplay of hostile environment, local and National Politics, finances, local needs and demands are constantly changing. This view 'from the outside' offers an opportunity to observe the current complexities of the organisation and set the context for my research.

However, as mentioned previously, there is another view; one which places me, the practitioner-researcher, at the centre of the research. To describe things from this perspective is also complex and inevitably incomplete but at least it is an attempt to square a circle.

The insider view of the organisation as an organism – April 2010

The importance of a 'living theory' approach is that it offers an different, 'inside experiencing and looking out', insight into what I hope has been established as a complex 'world' and can help me to understand transformation and judge outcomes based on my own standards of judgment, rather than those that might be imposed by politicians, technocrats or bureaucrats for the purpose of demonstrating how **their** work has changed peoples lives.

As part of the organism (organisation), I have a particular function; like the heart or liver may have a particular function. My job is Head of the Educational Inclusion Service. As such, I manage a number of other managers who, in turn, manage around fifty staff. I also manage considerable resources (around £17 million - direct and indirect) and set out strategy and processes for meeting the needs of vulnerable children and young people. I have ultimate (but delegated) responsibility for SEN and prosecution of non-attendance. The role is not simply one of support but also one of enforcement. I have been in this post since May 2004, although over that

period of time the job has evolved as legislative and organisational changes take place, people come and go and priorities change.

Before taking up this post, I was a senior officer in a neighbouring Local Authority. I have been in local government since 1991 as an educational psychologist and senior manager. Previously I had been a teacher since 1981.

Although there are times when I get frustrated with my job, and these frustrations have been mainly in the last few years as changes gather speed, I really do love my job and the work I do through my teams. In relation to Maslow's hierarchy, I am self actualizing. I have complete commitment to the work I do. This is not the same as a commitment to my employer or any aspect of the organisation. It is a commitment to **the work** I do; the values I hold strongly and a commitment to living those values on a daily basis; incorporating those values, as much as possible, into everything I do and say.

Over the years, and since I was very young, I have adopted, melded and shaped my views and values through experience and learning. The three core values I hold most dear (not a comprehensive list) include, **compassion for others**, particularly for those who, through no fault of their own, are finding life difficult; **inclusion of everyone in society** and an acceptance that everyone has a right to their views, even if I don't agree with those views; **fair play and social justice**, again for those who, through no fault of their own, find themselves subjected to exclusion, abuse and ridicule. I attempt to

live my life with these values at the very heart of my being. I do not always manage to live them, and I know I am not always perceived to live them, but I know I return to them when I have to 'anchor myself', such as when making decisions that can affect the lives of others. In holding these values dear, they become the rock on which I build my relationships. I believe, with exceptions, that most people accept my behaviour towards them as genuine, honest, warm and congruent (Rogers 1993). Only recently, when I have had to do something against my instincts and place people under threat of redundancy, have I felt the intensity of anger, sadness and derision, even what might be seen as 'hate', from those I have failed to protect. This has left me with feelings of mixed emotions. Good emotions in that I have been able to, through dogged determination and personal risk-taking, protect more jobs than I believed possible at first. Mixed with sadness that some people will go away from the organisation feeling betrayed and abandoned; a contradiction to my values. This is the 'eye of the maelstrom' for me; where my values are compromised; where I could easily walk away from the malaise; where I convince myself that I need to act decisively in sacrificing the few for the good of the many; where I wish it was someone else's job to make such decisions.

The metaphor of an organism, as Morgan suggests, raises the notion of "...survival as the key aim or primary task facing any organisation". However, for me this should not be survival 'at any cost'. Perhaps this is the biggest limitation of the organism metaphor, when applied to organisations that have

a strong humanist value base. For me, the only purpose of my (small) organisation existing is to provide services to the most vulnerable; those who would otherwise be disenfranchised in 'the market place'. Should the organisation merely look to survive, by giving up or changing its values to the extent that it is not able to carry out its core, values based functions, I would advocate its demise. I recognise that this may be controversial for some people within my organisation, who rely on the continuing existence of the service for their livelihoods. I have empathy for their position and will fight to ensure they are kept employed. However, for me, should the organisation abandon its value base, in order to put survival first, I would not wish to be part of it. In this way the organism, as a thinking, feeling, value based organism has a choice as to whether it wishes to survive or not.

My recent frustrations I believe, come about when I have perceived a clash of values, or at best 'competing' values, between my own and those of others, mainly from people in the 'bigger' organisations. Inevitably, there are tensions that exist in the 'world of education inclusion'. In the spirit of social justice, we aim to change situations so that children and young people who are socially excluded can be included. Our school, and society, culture has a tendency to exclude those who do not fit in with the accepted ways. In education inclusion, we aim to change cultures so that they are able to include those who otherwise would not fit. However, what happens if, when they are included, they disrupt the education of others in the class; what if one of those is my grand daughter? Where is the justice for her and her right

to a decent education? Is this acceptable in the name of inclusion or social justice?

On the other hand, in a desire to present as a low excluding authority and to maintain status as a high attaining authority, is it acceptable to informally exclude children and young people; to compromise their right to an education; to potentially diminish their life chances? These tensions, these competing values, are real and exist on a day to day basis within the organisation, analogous to a cancer eating away at the organism.

Knowledge and meaning within the organisation

If the adage 'knowledge is power' is correct then it is certainly an important aspect of making sense of the context of the organisation. What constitutes as knowledge, how knowledge is generated, how it is shared and how it becomes meaningful are important. Persisting with the organism metaphor, a typical organism gains knowledge through interacting with its environment, physical and social and interpreting the effects of the environment on itself (and itself on the environment) in relation to survival, and indeed, where people are concerned, to the other levels of Maslow's Hierarchy, changing its behaviour, where necessary. Within my current work context this can be seen happening as we respond to economic problems, reduce staff, change focus and behave differently. However, various parts of the organisation and individuals will see the changes differently and attribute different meanings to what is happening, including me. For instance, those people I have made

redundant are behaving in ways that suggest to me (as I don't know what they are thinking or what meaning they are giving to events) that they are angry with me, as the person delivering the bad news, as the person who had to make choices and chose to make them redundant. They demonstrate this through their reluctance to comply with reasonable requests and through campaigning to have the decision overturned. In empathy with them, I don't blame them! I have attacked them at the very basic level of need; threatened their livelihood and possibly pushed them to the edge of chaos.

In all my working life I have never had to threaten anyone in this way. It goes against the core values I hold, so why am I doing it? Why don't I refuse to do it? Why don't I just walk away rather than compromise my values? Should I change my values? (Joke: "If you don't like my values, don't worry, I have some more on the list you might like") These are questions I have asked myself many times and have come up with many answers. I have expressed my anger to my superiors at having to find this exceptional level of 'savings'. I have worked hard, maybe in penance, to avoid as many redundancies as possible by finding other savings from non-staffing budgets and I have taken professional and personal risks to reduce the impact on staff. One reason I don't walk away is that I have convinced myself, as one does, that if savings have to be made and people made redundant, then I am the best person to do it as I can apply the values I hold to the situation. Simple! I can use my relationships with others to 'soften the blow'; to 'motivate'; to 'manage

change' or to 'refocus' on the purpose of the organisation i.e. supporting vulnerable children and young people.

The important point here for me is that, in managing change, in trying to support staff who will make a difference to children and young people, in attempting to live my values, I cannot just stand back and observe the organisation; I am part of that organisation and therefore must also observe myself. Indeed, this is the central aspect of the research.

The context revisited

I have tried to explain the complexity of the context in which this research is taking place. I have tried to look at it from an outsider viewpoint using a metaphor of the organisation as an organism. Other metaphors are available! The benefit of this particular metaphor, for me, is that it pays attention to the external environment in which the organisation (organism) exists. Like with most organisms, the correct environment is crucial for it to thrive. Organisms are generally adapted to a particular environment and a change in the optimum conditions can have profound effects and potentially lead to its demise.

What this particular metaphor, as described by Morgan, does not do well is describe what it 'feels like' for the organism; how it is experienced from the insider perspective. I intend to expand on the metaphor, through my research, to include that insider perspective. My current (April 2010)

experience, which contributes to my embodied knowledge and which in turn gives meaning to my world, is that the organisation is in a state of distress and is being subjected to increasing pressures from a variety of sources, including from within. I have also described what is happening as a maelstrom; where there is so much happening that it is difficult to separate out one source of pressure from another and tackling one aspect can create future problems.

As an integral part of the organism I feel hurt and pain for myself and others as the external environment becomes increasingly hostile and the internal relationships breakdown.

Others, no doubt, experience their world differently. Some may take a more rational and distant approach i.e. 'There's no gain without pain'; some may take a wholly irrational approach (although to them it may seem totally rational) i.e. 'This is the end of the world as we know it'. Either way the situation is a complex interplay of rational and irrational thinking and emotions, of power and politics, of finance and competing priorities and not least, how I can continue to deliver quality services to vulnerable children and young people to a standard that I can live with.

It is within the complexity of this context that I will be conducting my research.

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Appendix 1

www.thisisbath.co.uk/news/Pre-school-scheme-axed/article.../article.html

Downloaded 22nd March 2010

Pre-school scheme to be axed

Tuesday, March 02, 2010, 14:22

Children with special needs in Bath and North East Somerset will miss out on a home education scheme after it has been axed by the council.

The Portage Service, which provides home visits for pre-school youngsters across the area to help them develop their social, motor and language skills, will close at the end of the year.

Labour councillors have slammed the money-saving cuts which have led to the loss of the service and have argued that the Conservative-led authority has not been straightforward in its handling of the budget.

Councillor David Speirs (Lab, Paulton) said the issue had not been raised during the budget-setting process.

"It is vital that vulnerable children with special needs and their families are well supported by the local authority.

"I have therefore asked for this decision to be examined by the children's services overview and scrutiny panel as soon as possible."

A spokesman for B&NES Council said the changes had been identified in the children's service action plan which was discussed at a watchdog panel meeting on January 25, and that the cuts were part of a long term plan.

He said: "Significant improvements to special education needs early years provision have taken place throughout the district over the past five to ten years.

"Services have changed accordingly and are now more community-focused, with the combination of children's centres, registered playgroups, and area special needs co-ordinators and other specialists all providing the support that parents tell us they need.

"Portage work has previously been considered as specialist. The improvements and changes to services mean much of this work is now considered mainstream."

The spokesman added that no children currently receiving portage services would be affected by the decision as the scheme would continue to the end of the year.

However he confirmed that no new cases would be taken on.